10 CHAPTER: VIEW BILL INFORMATION

10.1 Overview

You can view bills issued by the Department of Taxation in the IRMS Web application. Bills issued by localities do not display in the IRMS Web application. Bill information is available to you only if your MOU allows your locality this access.

All bill information is view only and cannot be modified.

Note: A bill entry displays in the Tax Account Period Entries window with a status of "informational."

10.2 View Bill Summary Information

You can view all of the bills that have been issued to a taxpayer from the Department of Taxation from the Bill Summary window.

Bill Summary Window

The illustration below is the Bill Summary window.

Bill Summary Window Fields

The table below lists the fields in the Bill Summary window and provides a brief description of each.

Field	Field Type	Description
FEIN	System Generated	The FEIN (Federal Employer Identification Number) of the account holder(s) if a Business (If the Tax Type is a Sole Proprietor, then the SSN and FEIN, if available, displays).
SSN	System Generated	The SSN (social security number) of the account holder(s) if an individual.
Customer Name	System Generated	The name of the account holder, if an individual. If a business, the name under which the business is legally registered.
Current Date	System Generated	The IRMS system date.
Memorandum of Lien	System Generated	(MOL) indicates if TAX has issued a judgment attaching the taxpayer's real property.
OCA Fee %	System Generated	The fee paid to an Outside Collection Agency (OCA).

Field	Field Type	Description
Initial Balance	System Generated	The sum of all bills initially assessed to the taxpayer.
Penalty and Interest Accruals	System Generated	The additional penalty and interest assessed on outstanding bills (updated monthly until the bill is satisfied).
Resources Applied	System Generated	The sum of funds used to satisfy the outstanding bills.
Resources Unapplied	System Generated	The sum of funds available, but not yet applied toward outstanding bills.
Outstanding Balance	System Generated	The total unsatisfied balance of all bills assessed to a taxpayer.
Balance Less Contested/Appealed	System Generated	The total amount of outstanding bill balances less the outstanding balances of any bills that are being contested or appealed.
Individual Income	System Generated	The total balance due for all Individual income tax bills, if applicable.
Withholding	System Generated	The total balance due for all Withholding income tax bills, if applicable.
Corporate	System Generated	The total balance due for all Corporate income tax bills, if applicable.
Sales/Use	System Generated	The total balance due for all Sales/Use income tax bills, if applicable.
Other	System Generated	The total balance due for all Other income tax bills, if applicable.
Bill Number	System Generated	A five-digit number assigned to a bill for tracking and identification purposes.
Assessment Date	System Generated	The bill date.
Tax Type	System Generated	The type of customer (i.e. individual, corporate, etc.).
Tax Account Number	System Generated	Identifies the tax account to which the bill is assessed.
Tax Account Period	System Generated	Identifies the period in which the bill is assessed.
Initial Balance	System Generated	The amount of the liability that is unpaid when a bill is created (this does not change even if adjustments are made to the bill or if the bill is abated).
Current Balance	System Generated	The balance on a specific bill, at a specific time, that is currently due (this changes if financial activity occurs).
Tap Filing Status	System Generated	The current state of the TAP that contains the bill, such as Filed Filed-Adjusted, or Not Filed.

Field	Field Type	Description
Bill Status	System Generated	The current state of the bill (i.e. new, open, paid, stop, abatement, write-off, discharge).
Part Pay	System Generated	Indicates if the tax bill was included in a Partial Payment Agreement (populates with Yes or No).
Third Party Lien	System Generated	Indicates if the tax bill was included in a Third-Party Lien (populates with Yes or No).
Collection Agencies	System Generated	Indicates the fee paid to an Outside Collection Agency (OCA) if the bill was referred to an OCA.
TOPS Flag	System Generated	Indicates if funds have been offset by the Treasury Offset Program (TOPS).

View Bill Summary Information

To view bill summary information, the following steps are performed:

Step 1: Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).

Step 2: From the Customer Profile window, select **Customer: Bill Summary**. The Bill Summary window opens.

Step 3: From the **File** menu, select **Close** to exit this window and return to the Customer Profile window.

10.3 View Bill Detail Information

You can view detailed information related to a specific bill from the Bill Details window in the IRMS Web application. This window has two tabs, the Bill Details tab and the Bill Reason Codes tab.

Bill Details Window – Bill Details Tab

The illustration below is the Bill Details tab on the Bill Details window.

Bill Details Window – Bill Reason Codes Tab

The illustration below is the Bill Reason Codes tab on the Bill Details window.

Bill Details Window Fields – Bill Details Tab

The table below lists the fields in the Bill Details window on the Bill Details Tab and provides a brief description of each.

Field	Field Type	Description
FEIN	System Generated	The FEIN (Federal Employer Identification Number) of the primary account holder if a Business.
SSN	System Generated	The social security number (SSN) of the primary account holder if an individual.
Customer Name	System Generated	The name of the primary account holder if an individual. If a business, the name under which the business is legally registered.
Secondary FEIN	System Generated	The FEIN (Federal Employer Identification Number) of the secondary account holder(s) if a Business.
Secondary SSN	System Generated	The social security number (SSN) of the secondary account holder if an individual.

Field	Field Type	Description
Secondary Customer Name	System Generated	The name of the secondary account holder if an individual. If a business, the name under which the business is legally registered.
TAP Due Date	System Generated	The date the taxpayer is due to file a tax return and provide payment information covering the taxes for the period.
Current Date	System Generated	The current IRMS system date.
Penalty Thru Date	System Generated	The date on which IRMS calculated penalty for the TAP (updates occur every 30 days on the outstanding liability).
Stop Type	System Generated	The type of stop (if bill is not on stop, nothing displays).
Locality	System Generated	The locality associated to the bill (if more than one, "Multiple" displays).
Interest Thru Date	System Generated	Date on which IRMS calculated interest for the TAP (updates occur every 30 days on the outstanding liability).
Bill Number	System Generated	The unique identifier assigned to the bill by IRMS.
Assessment Date	System Generated	The date the bill was created by IRMS.
Assessment Age	System Generated	The number of calendar days a bill is outstanding.
Tax Type	System Generated	The type of customer (i.e. individual, corporate, etc.).
Tax Account Number	System Generated	The unique ID assigned to the Tax Account by IRMS.
Tax Account Period	System Generated	The predefined period of time for which a specific tax account has liability.
Compliance Code	System Generated	A three-digit code used to identify and measure Compliance Revenue (Only displays if the bill is associated with a compliance code, such as non-filer, amnesty non-filer, etc.).
3rd Party Lien	System Generated	The amount of a 3rd Party Lien, if applicable.
Lien Date	System Generated	The date the t3rd Party lien was initiated.
Part Pay	System Generated	Indicates if the tax bill was included in a Partial Payment Agreement (populates with Yes or No).
TOPS Flag	System Generated	Indicates if funds have been offset by the Treasury Offset Program (TOPS).
Initial (Tax)	System Generated	The amount of tax included in the initial assessment.

Field	Field Type	Description
Initial (Penalty)	System Generated	The amount of penalty applied in the initial assessment.
Initial (Interest)	System Generated	The amount interest applied in the initial assessment.
Initial (Total)	System Generated	The total amount of tax, penalty, and interest included in the initial assessment.
Accruals (Tax)	System Generated	The additional amount of tax assessed on the bill since it was created (the system will recalculate penalty and interest whenever financial activity occurs on the bill).
Accruals (Penalty)	System Generated	The additional amount of penalty assessed on the bill since it was created (the system will recalculate penalty and interest whenever financial activity occurs on the bill).
Accruals (Interest)	System Generated	The additional amount of interest assessed on the bill since it was created (the system will recalculate penalty and interest whenever financial activity occurs on the bill).
Accruals (Total)	System Generated	The total additional amount of tax, penalty, and interest assessed on the bill since it was created (the system will recalculate penalty and interest whenever financial activity occurs on the bill).
Adjust/Abate/Write-offs/Discharges (Tax)	System Generated	The amount of reduction in tax due to any adjustments, abatements, write-offs, or discharges.
Adjust/Abate/Write-offs/Discharges (Penalty)	System Generated	The amount of reduction in penalty due to any adjustments, abatements, write-offs, or discharges.
Adjust/Abate/Write-offs/Discharges (Interest)	System Generated	The amount of reduction in interest due to any adjustments, abatements, write-offs, or discharges.
Adjust/Abate/Write-offs/Discharges (Total)	System Generated	The total amount of reduction in tax, penalty, and interest due to any adjustments, abatements, write-offs, or discharges.
Internal Offsets Applied (Tax)	System Generated	The amount of internal offsets applied or matched to tax.
Internal Offsets (Penalty)	System Generated	The amount of internal offsets applied or matched to penalty.
Internal Offsets (Interest)	System Generated	The amount of internal offsets applied or matched to interest.
Internal Offsets (Total)	System Generated	The total amount of internal offsets applied or matched to tax, penalty, and interest.
Payments Applied (Tax)	System Generated	The amount of payments applied to tax for the bill.

Field	Field Type	Description
Payments Applied (Penalty)	System Generated	The amount of payments applied to penalty for the bill.
Payments Applied (Interest)	System Generated	The amount of payments applied to interest for the bill.
Payments Applied (Total)	System Generated	The total amount of payments applied to tax, penalty and interest for the bill.
Payments Unapplied (Tax)	System Generated	This field is always zero because the unapplied payments only display in the Payments Unapplied field in the Totals column.
Payments Unapplied (Penalty)	System Generated	This field is always zero because the unapplied payments only display in the Payments Unapplied field in the Totals column.
Payments Unapplied (Interest)	System Generated	This field is always zero because the unapplied payments only display in the Payments Unapplied field in the Totals column.
Payments Unapplied (Total)	System Generated	The total amount of bill or lien payments that have not been applied to this bill (this amount only displays in the Total column).
Balance (Tax)	System Generated	The current amount of tax due for this bill.
Balance (Penalty)	System Generated	The current amount of penalty due for this bill.
Balance (Interest)	System Generated	The current amount of interest due for this bill.
Balance (Total)	System Generated	The total amount of tax, penalty, and interest due for this bill.

Bill Details Window Fields – Bill Reason Codes Tab

The table below lists the fields in the Bill Details window on the Bill Reason Codes Tab and provides a brief description of each.

Field	Field Type	Description
Bill Reason Code/Description	System Generated	Lists up to three reasons why the bill was created. Up to three reasons can display.

View Bill Details Information

To view bill detail information, the following steps are performed:

Step 1: Perform a **Customer Search** to open the Customer Profile window (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).

Step 2: From the Customer Profile window, select **Customer: Bill Summary**. The Bill Summary window opens.

Step 3: **Double-click** on the bill for which you want to view details.
The Bill Details window opens.

Note: You can also access the details of a bill by clicking on the bill that you want to view to highlight it and then clicking the **View Bill** button.

IRMS

File   Help

Bill Details

General Information

FEIN:	SSN: 333-44-5555	Customer Name: Yancy, Hazard
Secondary FEIN:	Secondary SSN:	Secondary Customer Name:
TAP Due Date: 05/01/2004	Current Date: 08/15/2005	Penalty Thru Date: 08/01/2004
Stop Type:	Locality: Richmond - 51760	Interest Thru Date: 05/01/2005

Bill Details   **Bill Reason Codes**

Bill Details

Bill Number: 03370   Assessment Date: 07/11/2004   Assessment Age: 401
Tax Type: Individual Income   Tax Account Number: 33-333445555S-001 Tax AccountPeriod: Jan 2003-Dec 2003
Compliance Code: 3rd Party Lien: 0   Lien Date: 11/18/2004   Part Pay: No   TOPS Flag: No

	Tax	Penalty	Interest	Total
Initial	$562.00	$65.76	$5.89	$633.65
Accruals	$0.00	$86.64	$22.73	$109.37
Adjust/Abate/Write-offs/Discharges	$0.00	$0.00	$0.00	$0.00
Internal Offsets Applied	$0.00	$16.92	$0.00	$16.92
Payments Applied	$562.00	$126.70	$28.62	$717.32
Payments Unapplied	$0.00	$0.00	$0.00	$0.00
Balance	$0.00	$8.78	$0.00	$8.78

Close

Step 4: From the File menu, select **Close** to exit this window and return to the Bill Summary window.